

Message

From: pmg@google.com [pmg@google.com]
on behalf of Scott Sheffer [ssheffer@google.com]
Sent: 9/9/2013 6:58:06 PM
To: Bonita Stewart [bonita@google.com]
CC: PBS Management Team (PMG) [pmg@google.com]; Chris LaSala [chrisl@google.com]
Subject: Re: Summary From 2013 Display Strategy Offsite

No additional major observations other than the conversation that happened around Video programmatic and the sense that we were quite a bit behind in that space and will have a ton to do in order to catch up. I was in and out of the meeting due to my team's leadership summit happening at the same time.

Scott

On Mon, Sep 9, 2013 at 10:17 AM, Bonita Stewart <bonita@google.com> wrote:
 PMG,

Details of Neal's Strategy offsite provided by Chris below:

I was personally pleased with the direction of the session and our collective proactive stance.

Scott S.,
 Any other observations?

Bonita

----- Forwarded message -----

From: Chris LaSala <chrisl@google.com>
Date: Fri, Sep 6, 2013 at 3:02 PM
Subject: Summary From 2013 Display Strategy Offsite
To: pbs-americas-directs <pbs-americas-directs@google.com>, pbs-specialists-leads <pbs-specialists-leads@google.com>, vertical-leads <vertical-leads@google.com>, Sofia Bergendorff <sofiaab@google.com>, Bill Davidson <billd@google.com>, Kate Stanford <kstanford@google.com>, Jonathan Dale <jdale@google.com>, Cyrus Beagley <cbeagley@google.com>

Hi Team,

Last week in MTV, Neal Mohan hosted the 5th annual internal Display Strategy summit. Purpose was to review and prioritize ~40 proposed incremental display/video projects to determine which will get resourced for 2014. *(Note current projects that are established are already resourced/underway were out of scope for this discussion--this was just about what to do that is new or needs incremental resources above current plan).*

Attendees included Susan and her senior PM and ENG leaders, Philipp and the GPL's, and several cross functional leaders from the buy-side (e.g., Jim Lecinski and Sean Downey) gTech, Legal, Privacy. Bonita and I participated on behalf of the PBS Americas team and represented your publishers' interests. Scott Sheffer represented PBS OPG.

This year the publisher efforts received significantly more attention from both our PM leadership as well as the group at large. 12 of the top 20 items will impact our publishers, with **6 (of the 7) purely pub-side topics voted into the top 20!** Another 6 were both buy/sell focused. And the 7th publisher focused topic was the grab-bag of "Multi-screen" the components of which were all voted into the top 20 elsewhere (single view of user, better mobile formats, more focus on

video). So for all intent and purposes, **ALL of the pub topics were voted into the top 20! 2014 will be the YEAR OF THE PUBLISHER!**

While the group cast votes for the proposals, in the end as Neal said, "this is not a democracy so don't be married to these rankings." Thus I am sharing themes vs voting outcomes with you.

- **Multi-Screen:** The concept of ensuring our products, buy and sell, work for all screens was a theme throughout both days.
 - **Creating a single view of a user across multiple screens** that works across all of our buy/sell products in a privacy friendly way was broadly supported (*this idea received the most votes by a large margin*).
 - **Mobile monetization improvements.** There is clear recognition of the significant opportunity ahead to increase mobile display monetization for both GDN, AdX and our publishers direct sold inventory. **Mobile specific quality and formats**, including better use of **location data** to drive RPMs, were highly voted items.
 - **Platform improvements for applications** to better meet the needs of app developers that have unique monetization was called out as a specific need.
- **Attract more brand dollars into the Google ecosystem:** There was robust discussion about the need for continued investment in brand solutions:
 - Better **formats** (e.g. innovation and extension of **engagement ads across platforms, Native Ads**)
 - better use of **Google & social data** to improve audience targeting
 - Accelerating **programmatic video** efforts
- **Unified stack and infrastructure.** There was agreement to reduce the duplication of feature sets across products and develop more stable, robust platforms that work seamlessly, specifically **between DFP & AdX**, as well as support for **programmatic reservations** (a.k.a. Project Jordan)
- **Content optimization and CMS solutions.** Although not an LPS priority today, there concept of helping publishers with content optimization, particularly across multiple screens, is an area important for the torso and tail publishers today and an area we in LPS should keep our eyes on.

Let me know if you would like to discuss in more detail as you build out your 2014 plans.

212-565-8801

Bonita C. Stewart	Vice President, Partner Business Solutions,
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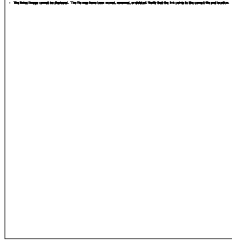
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